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ABSTRACT

Developers of a seven-day training course for British housing repair clerks offered at Tottenham College of Technology (London, England) reached the following conclusions: (1) such courses should be run "in house" for a particular employer, because job content varies widely; (2) the communications and technical activities in the course should be integrated because it is crucial that the clerks learn to apply technical knowledge while they question tenants about the requested repairs; (3) if multiple trainers are involved they must develop some understanding of one another's area; and (4) course assessment should be integrated with the learning experiences, provided that an environment of trust has first been created. Other college staff should consider the following questions (among others) when deciding whether to provide similar short courses at the request of employers outside the college: (1) how much time is needed; (2) what administrative support is needed; (3) which staff should take part; (4) how can the conflicting demands of short courses and regular long courses be resolved; and (5) what kind of staff development is needed. (The appendices in this report provide the following information about training housing repair clerks: estimates of time needed to teach particular content; questions to ask when discussing training needs; a typical structure of a six-day course; and some possible combinations for delivering the training.) (CML)

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RESPONDING TO NEW NEEDS

The Training of Housing Repair Clerks

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FEU / PICKUP

PROJECT REPORT

RESPONDING TO NEW NEEDS

The Training of Housing Repairs Clerks

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Professional, Industrial and Commercial Updating

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RP235

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FOREWORD

This is a summary of an FEU PICKUP project (RP235) undertaken by Marion Brion and Norman Griggs of Tottenham College of Technology.

The project was thoughtfully and carefully carried out and the full report contains appendices describing the structure, content and evaluation of a series of courses relating to the training of housing repairs clerks. It describes how the demand for the courses arose. They were delivered in-college and on-site, and their success led to demands for similar courses from other boroughs. An outline of the revised trial-tested course developed through the project is given in Appendix 1.

In addition to meeting their specific objectives, the authors have used their experience to offer more general advice regarding short course development in FE colleges. They have identified many of the problems that may arise, and offered solutions to most of these. They have also provided an example that would be useful for anyone training staff to carry out interviews with a technical content. A summary of the team's general comments is given in Chapter 6.

The full report, available from FEU on request, should be of interest to those responsible for short course development generally in FE colleges, as well as those concerned specifically with the training of housing repairs clerks.

Dennis Drysdale
Deputy Chief Officer
Further Education Unit

1. INTRODUCTION

Colleges of further education have always had to adapt to change, but in the 1980s change seems to be ever more rapid. Colleges are urged to respond more quickly to the needs of local employers, to be prepared to mount more short courses, to carry out consultancy work, and to develop training materials. They are often keen to respond but there is uncertainty about how they will manage to fit this work in with existing commitments.

- How much time is required to liaise with employers and how can this time be found?
- What methods are required to analyse training needs accurately?
- What are the best ways of working out content and teaching methods of new kinds of courses (and what adjustments are required in teaching methods)?
- What are the advantages and disadvantages of operating on employers' premises?
- How does this new kind of work fit in with the existing work, in terms of both lecturers' workloads and departmental and college organisation?
- How much time should be spent on evaluation?
- How is this work to be costed and paid for?

This report casts light on a number of these questions by looking at how a fairly conventionally organised inner-city college responded to requests from employers for a new type of training provision. It is not argued that what was done was perfect; rather that in its imperfections it reflects the real world, and the kind of efforts other colleges and lecturers are being increasingly required to make to meet today's needs.

This project was carried out at a single-site college in North London which, at the time, was organised in five hierarchically structured departments. The Building Department had students mainly studying craft, BTEC technician and professional courses. It had already developed one area of short course work for housing associations. The Business Studies Department had students on a mixture of secretarial, BTEC and accountancy courses. It had a flourishing Institute of Housing professional qualification course, and offered Housing

Options on the BTEC National and Higher Certificates. The latter depended on close links and a good relationship with the Building Department.

This study traces the response of the two departments to a request for a new type of short course to be run for individual employers. At the time, short course work was increasing within both the departments and the college. Although this was not an entirely new area of work, the degree of importance attached to its development required substantial adjustments to be made within the organisation.

2. SETTING UP A PILOT COURSE

Any programme of training begins with a perception of need, either within the college or by an outside organisation. In this case, the London Borough of Haringey suggested a course for repairs clerks.

When the college followed this up, Haringey Housing Department had decided that the course should concentrate on the diagnosis of minor defects in its low- and high-rise housing. It was recognised that the design of a suitable course would involve some research.

In the short time available, the college staff were only able to gain a superficial acquaintance with the work. Two visits were arranged and provided some basic information, but later experiences confirmed that more thorough analysis of the training need was essential.

Repairs clerks — Who are they?

A housing repairs clerk's work starts when a tenant reports a defect and asks for it to be repaired. Minor repairs are ordered directly, but more complicated ones are referred to a Technical Officer (see figure 1). This seems to be a straightforward procedure, but it is not always easy to differentiate between minor and major defects. A defect which is wrongly diagnosed as simple and unimportant may require immediate action, whereas sending a Technical Officer to inspect something straightforward is abortive and time wasting. Add to this the effect of emergencies, when harm to people or costs to the organisation may result if action is not taken quickly, and the complexities begin to become clear.

Ambassadors for the organisation

Repairs clerks are the first-line contact with the public and the way they respond to enquirers can be used to judge efficiency of the organisation as a whole.

Because of the importance of diagnosis, it was agreed that the new course should concentrate on defects. However, it was difficult to obtain specialist staff and it was only possible to hold the course on one day a week over a period of six weeks. Within the brief provided, the course was well received, but it was clear that much more development work needed to be done.

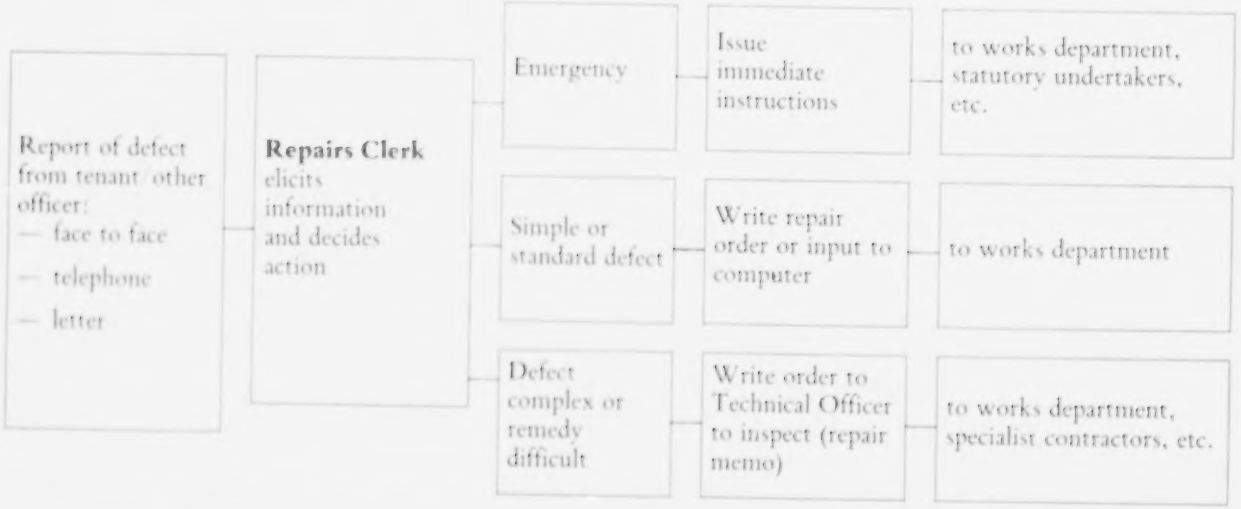
Report of defect from tenant/other officer:
— face to face
— telephone
— letter
Repairs Clerk elicits information and decides action
Emergency
Issue immediate instructions
to works department, statutory undertakers, etc.
Simple or standard defect
Write repair order or input to computer
to works department
Defect complex or remedy difficult
Write order to Technical Officer to inspect (repair memo)
to works department, specialist contractors, etc.

Figure 1: Repairs Clerks work flow (Haringey procedures)

Issues which needed to be tackled

The course concentrated on defects, but other important issues had to be considered. These were:

- communication with tenants;
- the stress inherent in the job;
- the standards required;
- the effectiveness of training.

Communications

The clerks were concerned that they may not be using the right techniques to elicit information. Most tenants were not technically minded and needed assistance to describe a particular defect, while others had language problems or mistook minor defects for serious problems. Some tenants also overstated the extent of the defect in order to obtain preferential treatment. In addition, technical knowledge was often necessary to arrive at the right diagnosis.

Stress

The stress experienced by the clerks during their work mounted during the day. This type of stress is not confined to the work of the repairs clerks, a similar build-up of stressful events occurs in many other occupations.

Standards

There seemed to be some difference in perception between the staff and management about the standards required. Two particularly problematic areas were the extent to which repairs clerks should question tenants to establish the nature of the defect and the level of detail required in the repair memo sent to the Technical Officer. The need to resolve these differences proved to be a theme running throughout the project.

Effectiveness of training

It was considered important to include an evaluation of the clerks' standards of work after training.

Response to the issues

It was clear that a completely new approach to course design, which would link learning about defects and communication skills, was required.

At this stage staff could have been faced with a difficult decision — Would the investment of resources required to develop the course be economically viable?

The team probably had as much information about the housing service and its training needs as was available. It was clear that there was a real and very extensive need for this type of training. What was much less clear was the extent of effective demand. To establish this the following questions had to be answered:

- What priority would housing departments place on the training repairs clerks?
- Were they going to try to meet this need by expanding their internal training?
- How were departments going to be affected by financial constraints?
- How many other providers were going to run courses in competition?

The FEU PICKUP project enabled two members of staff to be released for one day a week each and provided administrative assistance to research the needs and develop the training programme.

3. PLANNING AND EVALUATING THE SECOND COURSE

This chapter describes the planning, teaching and assessment strategies devised for the second course and its evaluation.

Planning the course

The priority was to analyse the training needs more thoroughly. Permission was obtained to observe and talk to repairs clerks at work, to collect completed repair memos, and to arrange for audio tapes to be made of telephone conversations about repairs.

The advantage of having two researchers soon became obvious, for even the process of discussing apparent dissonance of perception added greatly to the knowledge. The increase in the amount of time available for a more thorough analysis of the training need and its context was one of the major benefits arising from external funding.

The result of this research was a new course which lasted seven days, two of which would be spent on tuition in basic interviewing techniques by the Haringey Housing Training Officer. This would set the scene for the more specialised technical content provided by college staff during the other five days. The benefits of this approach would be twofold: reduced cost to the borough and a useful integration between 'internal' and 'external' training. However, it increased the need for co-ordination, and one of the researchers joined the two-day course as both observer and participant.

Evaluation

The five-day course was taught at the college and a comprehensive evaluation was undertaken. Some of the areas which may be useful to other course designers are described below.

The training approach to mature students

One of the major aims was to minimise any feelings of anxiety that mature students might have. Pre-course visits to meet some of the staff helped, and a number of other means of reducing anxiety were incorporated in the course.

Students' expectations

The first morning was used to introduce the students gradually to the week's work and discuss their expectations and concerns about the course. This

allowed a knowledge of students personally and promoted a relaxed and supportive group atmosphere. It also identified feelings of inadequacy, and uncertainties about their role emerged. Feedback indicated that course members benefited from this.

Flexibility

The need for adaptability of approach when designing and teaching short courses soon became apparent. When a representative from the Local Authority was unavailable and the tutor who was to supervise the case studies on legal aspects became unwell, both setbacks needed to be dealt with immediately and the programme was rearranged.

Variety of teaching methods

The methods used included a programmed text designed by the course team, models, video and slides, together with visits to a neighbouring property and a workshop.

The use of games

The introduction of games, based on behaviour analysis in the manner described by Rackham and Morgan[1], proved to be useful. Some risk is involved in introducing an untried game, but in this case the game had been kept very simple and proved a very useful vehicle for developing both question techniques and decision making. It was tried several times on different courses before a final format was produced.

Communication skills

These were taught through exercises on listening, with a structured sequence of instructions, and on question techniques. Role plays were used both for practising these skills and as a basis for writing a repair memo. They reflected the sequence of events at work, and were assessed by the group in general. The value of this as a teaching technique was that experienced clerks were able to help the less experienced, and group cohesion increased.

Stress

A session was devoted to the issue of stress and was based on similar courses for other housing staff, using group work and counselling exercises. While some found it arduous to be exposing themselves to the scrutiny of colleagues, all students referred to the help they had gained from the session.

Integration

Integrated teaching was used to try to solve the difficulty of linking technical knowledge and interviewing skills, but this proved to be a continuing problem and was only solved in later courses.

Assessment

It was agreed that assessment should aid diagnosis of the students' training needs and increase student motivation by giving positive feedback. This could be achieved by ensuring that any assessment was integral to the learning. The evaluation methods finally chosen are shown in figure 2.

Feedback from students

Simple feedback questionnaires were used on the second and last day of the course. The feedback strongly justified the participative nature of the course. The mid-course questionnaire provided an early check that a correct balance between the various elements of the course was being achieved.

Feedback level — 'What do students think of the course?'

Students write down expectations and anxieties about the course on the first morning.

Students complete simple feedback questionnaires on second day and final day of course.

Discussions at beginning and end of course.

On-course level — 'Have students learnt anything on the course?'

Exercise at beginning and end of course on building terminology and simple defects (pre- and post-test).

Observation and videotaping of role plays — using behaviour analysis schedule.

Self-assessment exercises on building defects.

Game 'Hunt the Defect' also used to assess level of decision making in diagnosis.

Exercise in completing a 'report to Technical Officer' following repairs role play.
On-the-job level — 'Are students able to transfer their learning? Comparison of repair orders completed before and after training. Discussions with managers *re* job performance.
Organisational level — 'What benefits have there been to the organisation as a whole?' Discussions with senior managers — not extensively dealt with on this course as it was necessary to check the other levels first.

Figure 2: Evaluation methods used on the Haringey course

(Acknowledgement to 'Assessing the effects of training', Housing Training Project, Housing Research Group, The City University, 1980.)

Assessment of technical knowledge

At the beginning of the course the students were given a test on technical terms. This allowed the course designers to analyse areas of weakness and specific questions were selected for retesting at the end of the week.

The final comparison proved to be very encouraging and confirmed the usefulness of this procedure, as both a learning method and a measuring instrument. Two students maintained 100% marks on both tests, while, on average, the other students doubled their initial score. Other practical exercises allowed students the opportunity for self-assessment and these were also felt to be useful.

Assessment of interviewing

Formal evaluation included systematic observation of each student's role play at the beginning and end of training. Despite some technical difficulties, it was possible to establish whether students had improved their question technique. Though some had, at times others retained less desirable techniques. The evaluation of these sessions led to considerations about redesigning the teaching techniques in order to make them more effective and to integrate communication skills and technical knowledge from as early a stage in the course as

possible. The issue of supervisory support at work was taken up with the employer on the post-course review.

Assessment of repair memos

Another formal measure used was assessment of repair memos completed after role plays, although the trainers still felt there was some ambiguity about the standards required and so had asked a senior manager to be present to assess the written exercise dealing with repair memos.

One of the trainers subsequently assessed the repair memos completed on the course, using the standard originally given by the management. It had been agreed that the memo should contain an extended description which gave the Technical Officer an idea of what to look for, the urgency of the repair, and the correct access information. On this basis, compared with the standard of memos done at work, the majority of students showed improvement.

'On-the-job' level

Behaviour change could also be evaluated by comparing repair memos produced when returning to work with those preceding the training; and there had been an improvement in the standard of most repairs clerks' work.

The overall evaluation

The question of whether the students liked the course is not the same as the question 'Was the training effective?'. The objective assessment measures built into the course had, on the whole, indicated a great deal of improvement. However, they also identified some issues which needed attention.

The value of the full evaluation and the objective assessment measures was that such issues could be discussed objectively, rather than subjectively. The final stage was the writing of a report which was the agenda for the review meeting and from which positive steps could be taken.

Conclusions — the value of the evaluation

The evaluation was of particular use in regard to the appraisal of teaching methods chosen. The feedback had shown that, overall, the teaching methods had been both successful and responsive to the needs of mature students. These were built upon in subsequent courses. The tests of technical knowledge confirmed that the content was right, but identified areas where adjustment was needed. Evaluation also confirmed the level of technical communication students had reached and the need for a thorough explanation of, and practice in, technical terminology.

The assessment of interviewing role plays and the games identified major areas which still required attention, in order that technical knowledge could be applied in a systematic manner as tenants were questioned. Because the improvement of interviewing techniques involved the changing of behaviour, teaching methods had to promote this by the early building of a supportive training group and plenty of practice with suitable feedback. Transfer of improved techniques to work also required the employer's co-operation in improving supervisory support. The games clearly showed that some course participants had difficulty in visualising defects from the descriptions given.

The assessment of repair memos identified the need for a clear agreement with the management of the department about the standard to be reached in training, and for this standard to be reinforced at work. As a result, in later courses a member of the management staff was asked to be present on the first day to discuss this. In addition, when the college was approached by Barnet to run similar courses, there was an awareness of this issue from the start and of the need to look at completed orders.

The 'on course' assessment of repair memos also confirmed that once standards were agreed this was a powerful tool for assessing the effectiveness of the training and was worth adding to the interview role plays when circumstances allowed.

Thus the evaluation had given the team a much improved basis to work on when planning future courses.

4. ADAPTATION FOR DIFFERENT WORKING ARRANGEMENTS

Barnet

The London Borough of Barnet had heard about the Haringey courses and was interested in a similar course for their depot clerks. The work was the same, but the organisational structure at Barnet was different.

Planning the course

It soon emerged that adaptation of the course was not simply a 'paper exercise'; extensive research was required in order to provide the appropriate training. However, the experience of research strategies with Haringey was useful. The ability to adapt research methods is important and requires the same degree of planning as designing a course structure. The evaluation of the Haringey course had indicated where research needed to be concentrated.

In order to gain the information necessary, visits to the various depots were required. The college staff elected to develop further the triangulation process* for the research by using the following strategy:

- visiting the depots together and interviewing both management and clerks;
- revisiting some depots separately with each researcher concentrating on specific areas which had arisen from the previous visit;
- examining completed repair orders and discussing the training with the central office managers and the training officer

Documentation on procedures adopted by the borough was also collected and analysed to provide an overview. As at Haringey, such visits broke down barriers which might have arisen during the course and allowed discussions with prospective course members and their managers.

Teaching away from home

Following this research, a course design was presented. The borough provided the teaching venue, a Community Centre on a quiet housing estate, which was ideal for the course, but teaching away from home brought with it certain considerations.

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* Triangulation may be defined as the use of two or more methods of data collection in the study of some aspects of human behaviour.[2]

It is essential when teaching on clients' premises that everything is prepared well in advance of the course. This may seem obvious, but it is all too easy to forget some vital piece of teaching equipment or visual aid.

Teaching methods and teamwork

Another element of such course provision is to plan well in advance the teaching method that each trainer will adopt. There was a place for both formal and informal teaching tactics within the course structure, but their selection needed careful consideration.

The necessary flexibility of approach depended upon two factors — the confidence of the trainers in each other and the recognition that flexibility is inherent to this type of course. The course must respond to the needs of the particular participants. It was necessary to alter timing occasionally to allow important issues to be debated to their logical conclusion.

The course participants

Knowledge of the ways adults learn was essential to the early planning. The attitudes which mature students bring to the course were important. The selection of course participants had been left to the borough, so there was a mixture of experienced and less-experienced clerks and some who had no experience of the work at all. Those who had been working for some time had naturally adopted practices through heuristic learning. It was important that they should not feel that the course would 'tell them they had been doing it all wrong', although it had to be realised that the course was about changing attitudes in response to the new requirements of current housing legislation. In order to offset feelings of resentment or anxiety, we were careful to acknowledge the value of what the students had learnt on the job.

Course participants were encouraged to draw upon their own experiences of encountering defects. This led naturally to a consideration of communication skills necessary to elicit the required information. Involvement in discussions led to common ground being established and assisted the participative teaching strategy.

It was found that many clerks had strong social reasons for doing a job which at times was very difficult. Abusive tenants are not uncommon unfortunately, and tales were told of being spat upon or assaulted. For some members the course provided a means by which these events could be distanced; for others it was a time to reflect that they might recur the following week.

Role plays

These were chosen with care to illustrate the whole learning process of the course and its relevance to work. They had been formulated from actual examples obtained during the research and represented different aspects of defects and of dealing with tenants. However, at times, the students disliked role play and complained of the artificiality of the situation, or that 'it is too much like work'.

Again, the cause of the resistance was mainly anxiety. Certain aspects of the depot clerks' course seemed to make role plays more difficult. Integrating the communications and technical training while providing a good interplay of teaching methods did not seem as effective in confidence building as group exercises.

The need to pose technical problems usually meant that the role plays had to be done by the whole group, rather than small groups, which is what would normally be done if anxiety seemed to be a major problem. The technical content probably also added to the stress on students.

When role plays did not appear to work well, it required further adaptability on the part of the team to switch quickly to another exercise in order that nobody in the group was embarrassed or lost face.

The remaining factor which affected students' reactions was a difference of views over the standards of work required, similar to that which had occurred at Haringey. In fact, at Barnet, reorganisation and a new job description for depot clerks was being planned at the time. Because of discussions with course members over this issue on the first course, during the second course the training officer and management staff gave course members some indication of the likely direction of change. Even so, the training approach was weakened a little by the fact that the standards required were once again not clear and explicit.

Evaluation measures used on the course were similar to, though less intensive than, those used for Haringey. Feedback indicated a considerable level of satisfaction with the course and, from assessment, it was clear that progress had been made in technical knowledge. Issues regarding standards and support for the staff at work were again taken up in post-course discussions with the organisation and the adjustments made to the course, following the Haringey evaluation, were justified.

5. WIDER DEVELOPMENTS

Marketing and publicity

The initial request for a course from Haringey had arisen because of contacts developed with college staff on existing long courses. The effectiveness of this course, based on a sound analysis of the needs, had helped to generate a further request from a neighbouring borough. This bears out Graham and Marris' conclusions[3] that much effective marketing is done through personal contact.

To try to discover whether anyone else had considered this training need, an article was published in *Housing* and there were short notices in other housing journals and contacts made by a team member who had contributed to a national housing education seminar. A number of organisations responded by requesting taught courses or assistance in developing in-house training, or asking about the availability of teaching materials.

In response to these requests, the team ran more courses (limited because of lack of time), encouraged other staff to do so (but staff development was needed), or developed consultancy and teaching materials.

Staff development

It had been intended to encourage other departmental staff to teach on the courses to spread the workload. A questionnaire was circulated to staff and the findings have been incorporated in the project's conclusions.

The responses also justified the original inclusion in the project funding for some form of training provision for the staff of the two departments. The topics of most use to staff in meeting the needs of the course were:

- consideration of participative learning strategies;
- an understanding of techniques for developing communication skills;
- the promotion of teamwork between the two departments;
- helping staff to cope with stressful situations.

To meet these needs, a senior trainer from the Greater London Employers Secretariat was approached and agreed to teach three sessions which considered:

- basic interviewing skills and teaching methods involved;

- counselling skills teaching;
- teaching 'stress' and associated group work.

Consultancy

The idea of consultancy was particularly interesting, but once again the major constraint was one of time. It limited our discussions with organisations to the extent of only being able to provide details of the work to date. It also became evident that any future course provision for other organisations would be possible only after the project had been completed. Undoubtedly, the consultancy role would provide considerable possibilities, but the manner in which this could be funded was still uncertain.

Teaching materials

It was clear that there would be a market for the teaching materials developed. However, these needed further work before they could be published. This work would not have been an economic proposition for the staff or the college concerned, so application was made to an external funder to develop this after the project had been completed.

6. RESPONDING TO NEW SHORT COURSE NEEDS — CONCLUSIONS

In responding to new course needs, staff, departments and colleges have to consider:

- the allocation of resources;
- methods of carrying out the work.

How much time is needed?

One major resource is the staff teaching time required for liaison with employers, analysis of needs, curriculum development, evaluation and staff development. The time needed will be affected by the degree to which the course is breaking new ground and the nature of the evaluation considered appropriate.

How can the time be found?

To find this time, staff need to:

- negotiate suitable arrangements for teaching hours and administrative support;
- estimate costs as accurately as possible (including a proportion for development and evaluation) and ensure that these costs are likely to be met;
- consider external funding if development costs are likely to be high;
- press for internal arrangements in the college to enable them to work quickly and efficiently;
- consider very carefully taking on a limited proportion of 'loss leaders'.

What administrative support is needed?

A distinction needs to be made between the administrative duties of teaching staff which are necessarily part of their professional role and those which can be undertaken by administrative staff. Suitable staff can then be recruited to do the latter, and paid for out of short course income.

Which staff should take part?

It is often of educational benefit for staff to do both long and short course work, but the administrative arrangements for this need to be well thought out.

Entrepreneur, lecturer, or both?

Some staff take on the more entrepreneurial role of developing new short course work. Colleges should:

- clarify the negotiating role of such staff;
- provide them with suitable training.

How can the conflicting demands of long and short course work be resolved?

Staff and colleges should consider:

- team teaching traditional courses;
- allocating certain days of the week for traditional courses and others for short courses;
- ensuring that money generated from short courses is used for full replacement of both teaching and administrative/pastoral duties of staff concerned;
- reallocating administrative and pastoral duties.

What other stresses of short course work need to be considered?

To help staff cope with the demands of short course work, it is necessary that:

- staff and managers recognise the importance of good team working and the time and skills needed to develop this aspect;
- the stresses of this work are considered in relation to the allocation of hours and the extent of new development.

What kind of staff development is needed?

- Staff development carried out with specific short course teams can particularly help in dealing with the stresses of the work, team building, and teaching methods specific to that course.
- Some staff need additional development in informal teaching methods and the varied approaches needed by adults in employment.

- Staff involved in the entrepreneurial role will probably find that attendance on some suitable external courses will be needed. But within departments or colleges, self-training groups of relevant short course co-ordinators could probably be a cost-effective solution.

What factors need to be considered in relation to resource allocation?

The main resources needed are staff time, administrative support and suitable accommodation. Staff and managers need to consider:

- the rate of development they can cope with;
- how development costs are to be met;
- ways of marketing their courses effectively;
- techniques for weighing up costs and benefits.

How do college ethos and organisation need to change?

Traditional courses are often accompanied by a hierarchical structure and strong departmental boundaries. It would be appropriate for a college planning the expansion of short course work to consider:

- streamlining financial and administrative procedures;
- enabling short course groups or departments to build up surpluses;
- administrative support for short courses situated close to the teaching staff may be more efficient than a single college-wide short course unit;
- whether short courses staff may need less hierarchical working structures than is traditional.

7. TRAINING HOUSING REPAIRS CLERKS — CONCLUSIONS

By the end of the period described in this report the college staff felt that they had arrived at a successful approach to training repairs clerks for their job. It is stressed, however, that because the job content varies and is linked with the extent of computerisation, the most effective approach is to tailor the course content to the particular circumstances, i.e. to run courses 'in house' for a particular employer. In order to make it possible for other colleges and employers to do this, FEU is publishing this summary, and making the full report available on request. Further information on the course materials may be obtained from the researchers. Trainers would then need to work closely with the employer, in the way described here, to identify the precise training needs and the standards required.

Appendix 1 provides a breakdown of the different aspects of job content involved. This, together with Appendix 2, would enable trainers to carry out the training needs analysis and identify the detailed specification of a particular course and the constraints on the structure.

Clearly, if an 'open offer' course for several small employers were to be run, a generalised structure would be needed and the trainers involved should consult employers or set up a small planning group with some interested managers to work out what the most common patterns of the job in their own locality are, and adjust the course accordingly. Such a small planning group need meet only once or twice before the course, and once after to evaluate it. Such small planning groups have been found to be invaluable, and some members may also be prepared to assist in tuition with the more job related parts of the course. However, there is a cost involved in terms of locating and contacting the right people and running the meetings. This is an example of the costs of good development and marketing which was referred to elsewhere in this report.

Appendix 3 provides an outline of an 'open offer' course, if the repairs clerks involved deal with both telephone and 'over the counter' enquiries, order both standard and non-standard repairs and need to distinguish between emergencies and work which could go through the normal channels. These courses can also be delivered in a number of ways though there are some constraints, mentioned in Appendix 1. Similarly, Appendix 4 shows the main possible combinations in adapting the course to meet the circumstances of a particular employer or group of employers.

The authors stress that they consider the most important outcomes of the piloting work described in this report are concerned with the teaching methods and the balance of content needed, rather than the course structure itself.

Foremost amongst these is the need to integrate the communications and technical activities on the course from as early a stage as possible. The issue of applying technical knowledge during the process of questioning and making the correct decision is the key activity of the job, and is not easy to develop. It became clear that if (as will often happen with this course) there are two trainers involved, they need to have, or to develop, some level of understanding of each other's area of expertise.

The piloting validated the overall approach of integrating assessment on the course with the learning experiences. The tests of technical knowledge, the games, the interview role plays and the completion of repair orders enable the trainer to assess the students' level of competence. The project demonstrated that such assessment can be acceptable to this type of staff, provided an atmosphere of trust has been created, the purpose of the assessment is clearly explained, and the result sensitively used.

Repairs clerks and their managers tend to be practical people. They carry out a service which is vital and has an enormous impact on the lives of countless tenants and residents. They appreciate training which they feel is practical and enables them to do the job.

It was very satisfying that the evidence received from the organisations and individual clerks indicated that the courses had been effective in improving both the standard of work on the job and staff enthusiasm for training.

APPENDIX 1 — LEARNING POSSIBLE IN THE TIME AVAILABLE

Content and Objects	*Time*
Basic interviewer training — listening, answering questions, building rapport	2 days, must be in a block
Dealing with distressed/anxious/ aggressive callers	Some elements can be incorporated in basic 2 days, but one more day, combined with stress issue, is really needed
Interviewing ethnic minority clients	Can be incorporated with all aspects of interviewer training if suitable trainers/materials used. Background of basic anti-racism training would be assumed
Telephone skills	Should be attended to in 2/3 day interviewing training and integrated unit
Coping with stress and conflict	Needs at least half day (one day preferably), with the remainder incorporated in the integrated unit
Specific skills of diagnostic questioning and decision making	Must be incorporated in integrated unit and develop alongside technical knowledge
Basic terminology and knowledge for description of building defects. Writing simple descriptions/use of computerised system	5/6 day basic integrated unit, which can be split up into modules. Visits helpful
Basic knowledge and skill in identifying simple defects/ordering appropriate repairs/identifying a defect that needs attention from someone more technically qualified/writing descriptions/inspection orders	5/6 day basic integrated unit which can be split up into modules, with on-the-job follow up and visits

Basic knowledge and skill for identifying defects which may cause damage to life and limb	Can be incorporated in above but needs specific attention
Basic knowledge of distinction between tenants and leaseholders. Basic knowledge of owner/occupier/tenant repair rights	A very basic level of input can be given, then this is incorporated in role plays and exercises in 5/6 day unit
Basic knowledge and application of rights of adjoining owners/liability.	As above
Knowledge of employers own repair priority/exclusions scheme.	Needs to be given by manager then incorporated in exercises
Identifying more complex defects and ordering repairs	This package is not sufficient, but some of the materials on diagnostic questioning and identification of defects can still be used; qualifications/further training should be considered.

APPENDIX 2 — QUESTIONS TO ASK WHEN DISCUSSING TRAINING NEEDS OF STAFF INVOLVED IN REPAIR ORDERING

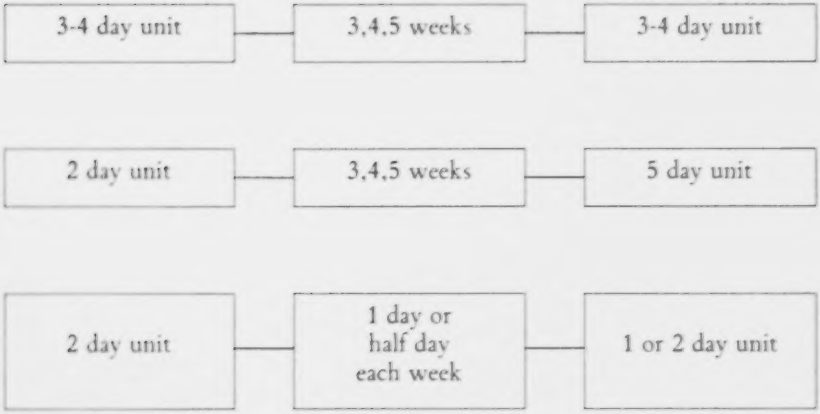
Question	*Training implication*
Do staff have extensive contact with members of the public? — Yes	Basic interviewing skills
Have they had training in basic interviewing skills?	No need to repeat basic training
Have they had training in the specific skill of questioning to obtain a description or diagnosis of a defect?	These skills usually need to be developed, in conjunction with technical knowledge
Do they have many ethnic minority clients?	Communications with ethnic minority clients
Do staff spend a lot of time on the telephone?	Telephone skills
Do they often have to deal with distressed, anxious or aggressive callers?	Interviewing skills extended
Are staff subject to stress and conflict in their job and if so have they had training in coping with this?	Stress component integrated with course — can take half day, but also integrated
What level of decision making about defects are staff involved in? (This is a key question in identifying the extent of technical knowledge needed and is extended in Figure 2)	Identify standards of technical knowledge required
What existing knowledge of defects have most staff got?	Staff with experience but no technical qualifications need to review the basic package
What level of technical advice is available to staff?	Staff with technical knowledge still need refresher and defect diagnosis technique

APPENDIX 3 — TYPICAL STRUCTURE OF A SIX-DAY COURSE

Activity	*Time*
Day 1 - am	
Registration and welcome	
'Expectations' regarding the course	In pairs, followed by feedback session of whole group
Explanation of course programme	Reference to course handbook
'Standards' of written orders/work procedures	Input from management representative: question and answer session
Pre-test assessment	Individual, followed by whole group discussion
Day 1 - pm	
Overview of defects and their diagnosis	Seminar input
Listening exercises, 'non-verbal' communication, question techniques	Individual pairs and group work
'Descriptions' game	Whole group
Day 2 - am	
Walls, floors and types of dampness	Individual learning package, followed by seminar on findings
Day 2 - pm	
Walls, dampness, etc. question techniques	Pairs and group work
'Hunt the defect' (walls and dampness)	Two groups
Day 3 - am	
Flat and pitched roofs	Seminar using models/slides
Exercises on roofing defects	Individual exercises followed by group discussion on results

'Breakfast' exercise and 'Hunt the defect'	Individual, pairs and group work
Scripted roles, stop/start interviews using roof defects as basis	Pairs and group work
Day 3 - pm	
Visit	Individual/group work using survey check list
Day 4 - am	
Joinery	Seminar. Use of models and slides
Interviewing: techniques involving problem situations; assertion/aggression: stress	Group work
Day 4 - pm	
Services to the building	Seminar: use of models and slides
'Hunt the defect' on services	Group work
Day 5 - am	
Problems of the interview	Group work
Day 5 - pm	
Counselling approach and action plans	Individual/pairs and group work
Day 6 - am	
Management of estate roads and external work	Seminar
Role plays	Pairs/group work
Day 6 - pm	
Review of stress and action plans	Individual/group work
Post test (technical knowledge)	Individual work
Review and feedback session	Whole group discussion

APPENDIX 4 — SOME POSSIBLE COMBINATIONS FOR DELIVERING THE TRAINING



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The objects for which the **Further Education Unit (FEU)** is established are to promote, encourage and develop the efficient provision of further education in the United Kingdom and for that purpose:

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b) to determine priorities for action to improve the provision of further education and to make recommendations as to how such improvements can be effected;
c) to carry out studies in further education and to support investigations of and experimentation in, and the development of, further education curricula and to contribute to and assist in the evaluation of initiatives in further education;
d) to disseminate and publish, and to assist in the dissemination and publication of, information about recommendations for and experiments and developments in further education.

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